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ABSTRACT

This booklet is about document analysis and its utility as a method in education evaluation, and is intended for evaluators in local school districts, regional education agencies, and state departments of education. Document analysis is described as a technique that relies heavily upon a variety of written materials for data, insights, and judgments about programs or events. Also described are document tracking, verification, and content analysis, the procedures employed in document analysis. A series of exercises based on actual documents related to the closure of several schools in Portland, Oregon, during the 1980-81 school year are provided for practice in these procedures. (LC)

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paper and report series

No. 78 EASTSIDE, WESTSIDE...
AN EXERCISE IN APPLYING DOCUMENT ANALYSIS TECHNIQUES IN EDUCATIONAL EVALUATION

Keats Garman

Research on Evaluation Program

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are welcomed.

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Northwest Regional Educational Laboratory

November 1982

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PREFACE

The Research on Evaluation Program is a Northwest Regional Educational Laboratory project of research, development, testing, and training designed to create new evaluation methodologies for use in education. This document is one of a series of papers and reports produced by program staff, visiting scholars, adjunct scholars, and project collaborators--all members of a cooperative network of colleagues working on the development of new methodologies.

What is document analysis and what skills are needed for its use in educational evaluation? In this report, Keats Garman addresses those questions and provides a series of exercises for practicing the skills of document tracking, verification, and content analysis. The exercises are based on actual documents related to the closure of schools in a large metropolitan school district.

Nick L. Smith, Editor
Paper and Report Series

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PART I. INTRODUCTION AND OVERVIEW

This booklet is about document analysis, and its utility as a method in education evaluation. It is intended for evaluators in local school districts, in regional educational agencies, and in state departments of education.

One way to learn about document analysis is to actually do it. "Eastside, Westside..." will provide the reader with opportunities to try out and practice some of the procedures involved in document analysis. In order to accomplish this, a number of actual documents have been included in the booklet, along with activity instructions to guide the reader in applying the specific procedures.

The documents provided here are some relating to decisions of the Portland (Oregon) School District in closing several schools during the 1980-81 school year. These documents are part of the public record of the District during that time, and have been selected for inclusion here because of their instructional value for this publication.

Objectives of "Eastside, Westside..."

This booklet should be read cover to cover in order to gain the full impact of the learning upon which it is based. If this is done, the following learning objectives will be accomplished:

The reader will:

- understand document analysis as a method for evaluation in education settings
- understand advantages and disadvantages of document analysis, relative to other methods
- understand and apply several procedures of document analysis, including

  tracking
  verification
  content analysis

PART II. WHAT IS DOCUMENT ANALYSIS?

Document analysis is a technique in education evaluation which relies heavily upon a variety of written materials for data, insights, and judgments about programs or events.

Ideally, document analysis is employed in conjunction with other techniques, such as interviews with key people, or participant observation. But document analysis can stand on its own as a technique for gathering retrospective data.

Document analysis is a systematic process, beginning with an hypothesis or hunch about how the event came about, who was involved, the sequences of activities, and causal relationships. Relevant documents are identified through a tracking strategy; they then need to be verified through a triangulation technique; the analysis of document content then follows a systematic and rule guided process of coding and category construction, which leads to judgments and interpretations granted in the context of actual events under investigation.

Advantages of Document Analysis

Despite the large numbers of documents and records which public school systems produce, and which are available to evaluators, document analysis remains a relatively underutiized approach in educational evaluation. Some of the advantages of using documents and records as sources of data and insight are the following:

- Documents and records are a stable, rich, and rewarding resource. They are usually readily available and accessible.
- Documents and records, as part of the public record, provide an unchallengable basis of facts and information upon which to base evaluation reports.
- Documents and records are a rich source of information about the context of events under investigation. They both arise from the context of the environment, peoples' perceptions, and consist of information about the context. Documents and records are sources of well-grounded data about events, people, decisions, and situations.

- Documents and records are available on a low cost basis. Using them often only "costs" the time to find, secure, and use them.

- Documents and records are nonreactive. They do not alter their behavior because they are the subjects of investigation, as may be the case in more reactive kinds of data gathering.

Disadvantages of Document Analysis

The document analysis approach is not without its critics, weaknesses, and disadvantages. Among these are the following:

- Documents and records may be non-representative samples. They may result from special events, or from pro forma requirements, rather than from a desire to keep accurate information.

- Documents and records may reflect subjective, rather than objective views, perceptions, and information.

- The validity of documents and records, in terms of sources of accurate, factual information may be questionable. Occasionally, the motive of the creator of documents and records may be deceptive, consciously or sub-consciously.

Evaluators employing the document analysis approach must be aware of some of these disadvanatages and criticisms, and be prepared to test documents before relying heavily upon them as a source of data, interpretation, or insight.

Document analysis begins with the assumption that there is some sort of record of events in which the investigator is interested. As Guba (1978) has put it, "...actions of persons, whether legal or illegal, inevitably leave tracks: if one knows how things work, and if one suspects that a certain action has occurred, one can imagine what tracks it must be leaving;..."

Tracking

Tracking of documents results from the evaluator's reconstruction of events, sequences, and causal connections about the programs, decisions, and people in which he or she is

interested. This working hypothesis about how things might have occurred leads to the search for documents and records which will confirm (or change) the reconstruction.

Verification

Documents which are identified and collected through the tracking strategy must be subjected to further scrutiny and analysis in order to establish their authenticity and validity.

Triangulation

While not unique to document analysis, triangulation is an important technique within it. Triangulation is the process of comparing and contrasting information about the same event from different sources or methods. The purpose of triangulation in document analysis is to verify the authenticity of the document itself or the information within it through interview data or cross referencing with other documents.

Content Analysis

Analyzing the content of documents and records in order to derive data, insights, and judgments about events is a crucial step.

Content analysis should be done in a systematic and objective way. Several guidelines regarding content analysis are important to review:

- Content analysis is a rule-guided process. The rules must be explicit, procedures clearly defined, and selection criteria stated.
- Content analysis is a systematic process--the rules and procedures for constructing categories and assigning content to them must be applied consistently.
- The aim of content analysis is generalization, or development of insights and understanding of the context.

- Content analysis deals only with explicit content, not with implicit content or inferences.

- Content analysis can be both a quantitative and qualititative technique. Especially with respect to document analysis, the frequency of data is often less important than the fact that it is there at all.

Because documents are rich in contextual information, the content analysis of documents, and construction of the categories that this entails, is sure to be well-grounded in the events, perceptions, and environment under study. The result is a more "natural" set of categories for analysis, and a less synthetic and investigator-controlled analysis. One is forced constantly back to the context of events for meaning and interpretation.

Summary

The analysis of documents can yield extremely rich data and insights into events and the context in which they occur. Coupled with other data gathering approaches, document analysis can greatly strengthen the power of an evaluation effort, and provide ways to deepen and extend the interpretive limits of the study.

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PART III: INTRODUCTION TO THE DOCUMENTS AND EXERCISES

The remainder of Eastside, Westside... is designed to give the reader opportunities to actually practice techniques in document analysis.

Included for this purpose are some actual documents relating to a major policy decision by the Portland, Oregon, School district in 1980-81 to close elementary and high schools in order to improve the district's cost-effectiveness in the face of inflationary pressures and declining enrollments. The specific documents provided here are

- The Superintendent's Report
- A local newspaper article reporting on the formation of a Citizen's Advisory committee

A portion of

- The report of the Citizen's Advisory Committee on School Closure/Consolidation
- A news article reporting on the Citizen's Advisory Committee recommendations
- Several letters from citizens, citizens' organizations, and a school principal
- A news article reporting on citizens efforts to prevent closure of a high school
- The Superintendent's recommendation for high school closures, and background analysis

The documents selected for inclusion here are all real ones. Names have been changed, and only portions of some lengthier documents have been included in the interest of economy.

You, the reader, are to proceed to each document in turn, read the instructions regarding the document analysis task, complete the task, and move on to the next document.

A certain amount of role playing will be important for you to gain the full measure of learning from these exercises. Here's your role:

> You, as a school district evaluator, have been assigned to assess the school closure procedure employed by the Portland District for possible use in your own district.
>
> Specifically, you are to
>
> - Describe the procedures used
> - Assess the strengths and weaknesses of them
> - Make a recommendation about their utility for your district
>
> You have only two days to make your assessment, and it's Friday afternoon. The key Portland District personnel are unavailable to interview. Your report is due Monday morning. Before the District offices closed on Friday, you were able to get the documents listed above.
>
> Proceed now to Exercise No. 1.

Exercise No. 1: Developing a Hypothesis and Tracking Documents

Directions:

1. Read the Superintendent's Report Document.

2. From it, develop a hunch about the key events, their sequence, and people involved in them. Outline this hunch here:

3. From your hunch, identify the kinds of documents and records you think are likely to be available as a result of the events and activities in closing schools. List those here:

4. Based upon the content of the document, how would you characterize the context of the board decision?

5. Proceed to the next exercise.

Superintendent's Report

During a special meeting on Thursday, August 28, 1980, the Board of Education adopted the following policy for School Closures and/or Consolidations:

RESOLVED, That the Board of Education directs the Superintendent to develop and coordinate a District-wide plan for school closures and/or consolidations;

BE IT FURTHER RESOLVED, That the Board of Education directs the Superintendent to insure that programmatic, geographic/demographic, fiscal and desegregation variables are inherent in this plan;

BE IT FURTHER RESOLVED, That the Board of Education directs the Superintendent to utilize the special abilities of the District's professional staff, independent consultants, city planners, community and other lay citizens in the implementation of this study including the formulation of specific closure/consolidations recommendations;

BE IT FURTHER RESOLVED, That the Board of Education directs the Superintendent to present to the Board at its September 8 meeting a specific program for citizen participation in this plan. Such program shall include a recommendation of program goals and criteria to the Board no later than November, 1980.

The following steps shall be implemented:

a) Superintendent plans, coordinates and implements study based upon the use of professional staff, city planners, independent consultants and extensive use of citizen participants including Area and local school citizen advisory committees, community "clusters," community action groups and/or other interested organizations (PTA, SFC, etc.);

b) Findings of closure/consolidation study are reviewed/edited by Board; substantive changes, if any, are returned to Area and local school citizen advisory committees, community "clusters," community action groups, city planners and/or other citizen groups for final review/recommendation;

c) Board/Superintendent review final recommendations by Area and local CAC's, community "clusters," community action groups, city planners, and others;

d) Superintendent recommends specific school closures to Board, including budgetary impact statement;

e) Board acts on Superintendent's recommendation;

f) Due notice is given to schools affected by Board decisions;

g) Transition plans initiated and carried out by Area administrators in consultation with Area CAC's, LCAC's and building principals of affected schools.

As indicated in the Board's policy action of August 28, 1980, the Superintendent was directed to define program goals which would be the focus of all citizen and staff actions in preparing final closures/consolidations recommendations. These program goals are:

1. School Program Goal: "This plan shall offer all students in Portland the opportunity to receive an excellent education, and shall assure equality of opportunity for personal, educational, and social development."

2. Fiscal and Facilities Goal: "This plan shall consolidate programs in such a way that the District's goal of quality, equitable education is achieved in the most economical manner for taxpayers."

3. Student Service Goal: "This plan shall provide necessary space and facilities to serve students with special needs and to provide support services to instructional programs; and shall locate and combine special and regular programs in a manner consistent with fiscal goals."

4. Desegregation Goal: "This plan shall be in compliance with state and federal laws, regulations and guidelines relating to desegregation, and shall implement the intent of District policies, regulations, and School Board resolutions relating to desegregation and integration, taking into account special needs and ethnic backgrounds of students."

5. Community and Neighborhood Integrity Goal: "This plan shall create attendance boundaries that insofar as possible have been developed in cooperation with neighborhood leadership to preserve neighborhoods that are viable from the standpoint of traditions of association, shared interests, shared cultural values, and shared services."

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pp. ii and iii in Superintendent's Report, April 4, 1981

Exercise No. 2: Triangulation

Directions:

1. Read the Citizen's Advisory Committee report, and the news article following it.

2. How would you evaluate the validity of the Committee's recommendations? What confirmation would you seek?

3. How adequately did the Committee deal with the new criteria--FTE distributions?

4. What new information about the context of events is now emerging?

5. Proceed to Exercise No. 3.

Application of Closure/Consolidation Criteria Application

In addition to criteria development, the Citizens' Committee was charged with the task of assisting the administration in applying the closure/consolidation criteria to all of the District's schools and of developing alternative school closure plans.

The Citizens' Committee agreed to select an initial sample of schools for further evaluation on the basis of fiscal and facilities criteria. On December 3, 1980, the Fiscal/Facilities Subcommittee assessed each of the District's schools on eight factors: rated condition; current percent enrollment; projected percent enrollment; maintenance requirement per square foot; maintenance requirement per student at capacity; cost savings at capacity enrollment; and one-year average maintenance requirement. As a result of its evaluation, 27 schools were recommended for further study by the Fiscal/Facilities Subcommittee. The ratings of each school on each of the eight fiscal/facilities criteria are included in the appendices to this report.

Following the identification of the first sample of schools, the other four subcommittees suggested that schools other than those in the first sample continue to receive consideration. All subcommittee recommendations were reviewed and discussed at a meeting of the Citizens' Committee on December 30, 1980. As a result of the Committee's deliberations, a second sample of 19 schools was selected for additional analysis. While there was considerable overlap between the first and second samples, some schools were included in the second sample which did not appear in the first sample.

At its meeting on January 21, 1981, the Citizens' Committee reduced the second sample to 13 schools. Some elementary schools were dropped from the sample because of their proximity to other schools in the sample. In some instances, the closure of two nearby facilities presents problems in devising consolidation options which avoid long transportation distances and/or crowding at consolidated schools.

On January 30, 1981, the Committee received an addendum to its charge from the Superintendent of Schools. This addendum, a result of the Board of Education's discussion at its meeting of January 26, 1981, requested that the Citizen's Committee include the impacts of higher FTE ratios, at the secondary level, in its study. Higher FTE ratios may be necessary because of the magnitude of the District's fiscal crisis and because of the Board's consideration of shifting some resources from secondary to elementary education.

At its meeting of February 4, 1981, as a result of the addendum to its charge, the Committee added Jackson to its list of high schools to be evaluated for closure. Jackson was added because it is one of the three high schools in the District to receive a lower FTE ratio to maintain educational quality at small enrollments. The other two high schools receiving this "small school subsidy," Adams and Washington-Monroe, were already being assessed. The Committee reasoned that a uniform and higher FTE ratio would disproportionately damage the programs at those schools currently favored in staff allocation rules. The loss of FTE at the small schools would hinder their capacity to offer diverse electives or multiple levels of instruction in required courses.

Jefferson High School also benefits from existing resource distribution policies. However, Jefferson's favorable staff allocation is not simply a result of small enrollment, but is tied to the District's policies regarding desegregation and the education of disadvantaged students. The Committee concurred that the policy issues at Jefferson are complex and extend into areas beyond the committee's charge. Therefore, the committee did not add Jefferson to its list of schools for further closure consideration.

I. Committee Rationale:

The Committee's decision is based on Adams' low enrollment, its high per pupil costs, and its inability to offer a comprehensive high school program at its current enrollment. In addition, Adams registers only 36% of its attendance area students and ranks last in the District in the number of students enrolled from other attendance areas.

In arriving at its decision, the Committee considered factors which may have contributed to Adams' enrollment problems. These factors include the school's history as an experimental program, previous closure threats, and the recruitment out of Administrative Transfer students. However, the Committee concurred that a continuation of efforts to reverse enrollment trends at Adams would be both risky and expensive. In addition, such a strategy could compel the closure of another, more educationally cost-effective, school and the disruption of a larger number of students.

The combination of a middle school and a high school at the Adams site is viewed a undesirable from a program perspective. The use of Adams for a middle school was also considered but is not supported because the Committee concluded that, for program reasons, middle school

enrollment should not exceed 700 to 800 students. Placing a middle school of 700 to 800 in a building designed for 1700 students does not solve the problem of underutilization.

The Committee is concerned about the desegregation impacts of an Adams closure and values the multiethnic/multicultural character of the school. While Adams' minority percentage is the second highest in the District, it ranks eighth in number of minority students. An examination of alternative attendance area configurations showed that Adams' students could be placed in contiguous attendance areas without undermining racial balance.

In an amendment to its motion in favor of an Adams closure, the Committee voted 15 to 0 in favor of recommending the retention of Adams' night school program at another site. The Committee values the night school's service to students who lack other opportunities to complete high school. The Committee also favors the movement of the Newcomer Program to a school with a growing Asian population and suggests that the Program be relocated at Madison. The Committee is concerned about the disposition of the District's newest high school facility and some members propose an exploration of the movement of another high school to the site.

CLEVELAND

Recommendations: Remain open.

Committee Vote for Closure:
Yes: 0
No: 15

I. Committee Rationale:

Cleveland was considered for closure because of a low rating given to its physical facility. This low rating was based primarily on maintenance requirements and low projected enrollment percentage. A consideration of other factors prompted the Committee to oppose closure. At Cleveland considerable enrollment in special education programs originates in the attendance area and the mainstreaming of special education children is excellent. Cleveland has a good comprehensive program, specialized offerings in business and marketing, per pupil costs below the District mean, and above average registration of its attendance area students.

JACKSON

Recommendations: Remain open.

Committee Vote for Closure:
Yes: 2
No: 12
Abstention: 1

I. Committee Rationale:

Jackson has the second lowest enrollment and fourth highest per pupil costs in the District. In addition, Jackson is one of the three schools in the District to receive a favorable FTE ratio because of low enrollment. The Committee is concerned about Jackson's capacity to continue to offer a comprehensive program, if FTE ratios are made uniform or are raised. Jackson's special education students could be accomodated at other schools.

The Committee's decision to recommend that Jackson remain open is based primarily on the growth potential in the attendance area. A decade-long building moratorium, which was due to the absence of sewers, is ending. Nearly one-third of the potential is in the Jackson area. Other factors bearing on the Jackson decision included the school's strong contribution to voluntary desegregation. Jackson is the second newest secondary facility in the District and its geographic isolation on the periphery of the city would make it difficult for Jackson students to reach other schools via public transit.

Jackson's relationship to Wilson and Lincoln, the two other westside high schools, was discussed. At this time, enrollment at all three schools could be consolidated at two sites. However, in addition to the growth potential in the Jackson area, at least one large scale planned unit development is going into the Lincoln attendance area. The Wison area also has a significant amount of buildable vacant land. Independent of birth rate increases, the westside combined has vacant land, zoned residential, that, if fully developed, could produce 1,500 to 2,000 high school age students. The Committee did not have sufficient time to study the probability of such development occurring or its likely time frame. Another unexplored question is whether a high school closure would inhibit development. The Committee suggests a more extensive investigation of the relationship between the westside high schools and urban growth.

WASHINGTON-MONROE

Recommendations: Closure, September, 1981

Relocate Medical and Dental Technology Programs at Cleveland; Move Child Care Program to another suitable site; Discontinue the Food Service Program.

Committee Vote for Closure:
Yes: 12
No: 3

I. Committee Rationale:

Washington-Monroe is recommended for closure because of its low enrollment and its high per pupil costs. In addition, Washington-Monroe registers only 40.9% of its attendance area students.

In evaluating Washington-Monroe, the Committee was aware of a one-half million dollar investment in the facility and of the recent merger of Washington with Monroe. However, it was the Committee's consensus that additional risk and expense would be entailed in an attempt to reverse trends at this school. Furthermore, the retention of Washington-Monroe could compel the closure of another school with more students, lower costs, and greater neighborhood enrollment.

The Committee was impressed with the high quality of Washington-Monroe specialized medical and dental technology programs. These programs are providing good job entry-level training. Since over one-half of Washington-Monroe's enrollment is drawn from other attendance areas, the Committee believes that it is likely that the magnet students will follow the programs, if they are relocated. In an amendment to its closure motion, the Committee voted to move the medical and dental magnets to Cleveland High School, to move the child care magnet to another site, and to discontinue the food service program. (The Committee vote in favor of this amendment was 11 yes, 3 no, and 1 abstention.)

Cleveland is suggested for the medical and dental programs because of its proximity to Washington-Monroe, its accessibility via public transit, and its available capacity. In addition, Cleveland's new science facilities would be an asset to the magnet programs. The proposed discontinuation of the food service program is based on low student interest and movement expense.

Concern was expressed about the desegregation impacts of a combined Washington-Monroe and Adams closure. Washington-Monroe has the district's third highest minority percentage and the fifth highest number of minority students. An examination of sample attendance area configurations showed that solutions are available which would not cause a deterioration in racial balance. Special Education and ESL-Bilingual students could be served at nearby schools. The community is concerned about the continued public use of the building and the Committee urges the District to explore appropriate uses.

School Closure Report Delivered to Board

The Portland School Board received a citizen committee's recommendations Monday night for closing two high schools and three elementary schools next year. In addition, the committee proposed elmininations of the upper grades in a fourth elementary school.

The proposed closures, aimed at addressing an enrollment decline of more than 20,000 students in the past decade, would have an estimated $1.6 million in 1981-82.

Superintendent Robert West will react to the recommendations at a board meeting scheduled for 9:30 a.m. April 4. The board plans to make a final decision by May 15.

Elementary schools proposed to be closed are Foster, Normandale and Sacajawea. Additionally, the committee has proposed elmination of the upper grades at Buckman School in southeast Portland.

Adams and Washington/Monroe High Schools also are proposed to be closed.

The closure recommendations cap six months of deliberations and public hearings by the school district's 14-member school closure citizen committee.

Bill Colangelo, committee chairman, called the group's decision-making process objective and "definitely fair."

But board member Fred Norris questioned the fairness of the process since no west side high schools were recommended for closure.

"We do suggest the west side high schools be looked at," Colangelo said. But he said the committee found enrollment decline primarily on the city's east side and found substantial potential for urban growth on the west side.

Sporting a "save Adams" badge, school board member Walt Poulsbo questioned the closure of Adams when it has the second most populous attendance area of any of the city's 13 high schools.

Colangelo replied that only 36 percent of the students who reside in the Adams area actually attend the school. Most Adams area students attend other high schools throughout the city, he said.

Colangelo admitted that the attrition might have been caused by past practices by the school district. But he said the committee couldn't address that problem.

Colangelo said the enrollment at Adams, which was opened in 1969 as a national model for experimental education, was so low that students were getting shortchanged by the lack of curriculum offerings.

Trigonometry had to be dropped at the school this year because only two students signed up to take it, Colangelo said. "It's difficult to provide the right education when you have only 600 students," he said.

Constance Meteague, co-chairman of the citizen group's desegregation subcommittee, urged the board to place some educational program in the Adams plant because of widespread neighborhood opposition to closure.

"It's a very explosive situation," Mrs. Meteague said. "We're sitting on a powder keg."

A group of Adams parents presented the board with a petition measuring more than 100 feet long and carrying more than 1,500 signatures to keep the school open.

"I just like to thank my lucky stars that those ladies weren't running the recall campaign," quipped board member Steve Bell, referring to an unsuccessful recall petition drive against four school board members last year.

The Oregonian
March 24, 1981
Citizen Committee Closure recommendations
delivered to School Board

Exercise No. 3: Content Analysis

Directions:

1. Read the letters from citizens, citizens' organizations, a high school principal, and the news article which follows.

2. Identify and build a set of categories which describe the content of these letters.

3. Identify the frequency with which certain concerns are mentioned. Also identify a concern that seems to have a great deal of merit, authenticity, and persuasiveness, even if not mentioned frequently.

4. What new information about the context of events is evident in the letters?

5. Proceed to Exercise No. 4.

Dear Mr. Colangelo:

As a concerned local businessman and former student of Clinton Kelly High School of Commerce, I must voice my disagreement with the committee's evaluation in regard to Cleveland High School's neighborhood and community integrity.

Cleveland High School is a vital part of the local community, being situated in one of the few areas which have remained stable during the past couple of decades. The Westmoreland, Eastmoreland, and Reedwood neighborhoods are unique to the city of Portland in that they did not deteriorate in the 60s as did much of the city core areas.

Cleveland High School serves a socio-ecoromic district spanning an entire spectrum from the very poor to the very affluent. The make-up of the student body reflects the heterogeneous surrounding area. Twelve percent of the student body are Indo-chinese students studying English as a second language. Approximately 6% of the student body are administrative transfer blacks. In addition, there are classes for the physically, mentally, and emotionally impaired. Of the 130 multi-handicapped enrollment, 22 students are bussed from outside the area, the remaining 108 students live within the immediate community. Certainly, few student bodies in the State can match the social, economic and cultural balance there exists at Cleveland.

I am a local businessman and have employed students from Cleveland High School, and dealt with the faculty in a variety of matters. In every instance, I have found a dedicated and caring attitude among the administration.

The closing of Cleveland High School would not only be a great loss to the community, but Portland School District would lose a most unique student body.

Respectfully submitted,

We are here today to address some questions and share some of our concerns with your committee.

If you have read the material sent to you on behalf of Cleveland, you have ample evidence that Cleveland meets the goals set forth by your committee. We made it clear that our attendance boundaries, which are over thirty years old, "preserve neighborhoods that are viable from the standpoint of traditions of association, shared interests, shared cultural values and shared services," and that confidence in the school is manifested by the presence of second generation students.

We comply with laws, regulations and School Board resolutions concerning desegregation; and we have adhered to School Board policy doing so. Our Business Management/Marketing magnet has attracted students from other areas in the city, but our coaches do not go to schools outside our attendance boundaries to recruit for athletics.

We have more classrooms assigned to "students with special needs" than any other high school. You have been given evidence of the assimilation of these students into the student body and their acceptance by staff. In fact, the Student Service Subcommittee gave us an 'A' rating in every category except architectural barriers; but you should know that, in spite of architectural barriers, we have two students confined to wheelchairs who attend every day!

The Program Subcommittee agreed that we offer all of our students "the opportunity to receive an excellent education," and we "assure equality of opportunity for personal, educational and social development." We have given you evidence that we more than meet all the criteria of this subcommittee, that in fact we excel, and that we accomplish this at a reasonable cost to the District.

Our geographical location is such that none of this is contrived. We are easily accessible by public transit, thereby saving the District the expense of activity buses. The variety in our student body is natural, a variety lacking, for example, at Wilson and Franklin, due to their more homogeneous feeder school neighborhoods. Our student body is bolstered by a large segment of the economic middle, unlike Lincoln, for example, whose population contains more of the extremes of rich and poor. Nor do our advance classes depend upon the draw of the District's only academic magnet for their enrollment as do Lincoln's. Nor does our variety depend upon the District's manipulation of students to conform with desegregation policies.

The designation by the Fiscal and Facilities Subcommittee leaves us bewildered. We read that the maintenance requirement per square foot for Frankin is twice that for Cleveland. Roosevelt, Grant, Franklin and Jefferson are in as bad shape

physically and the cost of refurbishing them would be greater than the cost at Cleveland, but you have not examined those schools as you have examined us. If the goal is to provide "quality, equitable education...in the most economical manner" and the cost of operating our building is combined with the cost of our program, then surely we meet that goal.

Seven years ago the District adopted a policy of changing from K-8 to primary-middle school configuration. The old Area III, which Cleveland is in, has complied with that policy to a greater extent than either of the other areas. You should understand that when a K-8 school decides to become a primary school, it closes its upper grades to students who had expected to attend it through the eighth grade. This change causes anguish and ill will throughout the area affected. It is difficult for us in Area III, who have experienced this anguish while complying with District policy not to feel discriminated against by you, when we see Wilson's and Lincoln's K-8 feeder schools remaining unchanged and Wilson and Lincoln not scrutinized by you. The message being received is that if one lives in the right place, District policy is irrelevant.

It was with great surprise that we found our school placed on the Neighborhood Integrity Subcommittee's list of schools for further study. The stated reason for our inclusion on that list was that the Subcommittee did not know enough about the neighborhoods in the Cleveland Cluster area. Cleveland High School was in reality added to a second list by default on the committee's part, and not because we were deficient in this area and indeed warranted further study.

The neighborhood Integrity Subcommittee came to Cleveland on Monday, January 19, for our presentation and for information on what we regard as one of our strongest areas--neighborhood integrity. Two nights later at the Committee of the Whole meeting on Wednesday, January 21, the Neighborhood Integrity Subcommittee stated that they felt all the high schools had neighborhood integrity, and that all schools so listed (Adams, Washington-Monroe, and Cleveland) would be eventually removed from this category. The subcommittee said they were not going to rank or grade the three schools nor would there be a report on the visits.

We feel a great disservice has been committed against the Cleveland community by this action, and we request that the Neighborhood Integrity Subcommittee make a full report of their findings. Their report is vital to our school's over-all evaluation, and their findings should be included in the Committee of the Whole's final document. Very little concrete information about Cleveland is presently in your proposal.

The question of a fair and open process concerns us greatly. Schools with a 'C' rating from the Fiscal and Facilities Subcommittee made up the original list. Then, apparently arbitrarily, three of those schools were removed and a 'B' school, Washington-Monroe, was added. Three questions arise: (1) What does that do to the validity of an A, B, or C rating? (2) Why were these decisions made without further public examination of those schools? (3) Why were all schools rated 'B' not added to the list? Jackson, Franklin and Lincoln would then appear on two lists, Marshall on three.

This committee has stated repeatedly that schools can be removed from the list or added at any time. We submit to you that the time has come to evaluate all high schools in all of the criteria, in a uniform system of rating and evaluation of the information. It is critical that all the high schools be held accountable for their deficiencies, not just the three high schools presently on the list.

The School Board and administration should be able to profit from the information you are compiling for them. For example, the fact that Benson appears on two lists does not necessarily make it a candidate for closure. But it should indicate to the Board that Benson might have some shortcomings worthy of further study. The first question might be: does Benson's appearance on the Student Services list mean that handicapped students cannot qualify for Benson because of their handicaps?

The citizens of this city have the right to know what the strengths and weaknesses of each school are. No matter which schools are closed, it will be a painful process for those students, staff members, families, and neighborhoods. Through this whole procedure we need to be supportive of one another, not pitted school against school. If your committee is to remain credible, you must be supportive of all neighborhoods, apply your criteria to <u>all of the Portland Public High Schools</u>, and keep the public aware of the ultimate goal of providing better education for all students.

We at Cleveland have not feared the scrutiny with which you have examined us, and we have responded to the best of our ability. We are proud of our school; we are above the district mean in neighborhood hold in spite of our proximity to LaSalle and Benson High Schools. We think we have shown you that the atmosphere and educational process which exist in our building are valuable enough to the district to warrant preserving and being made available to students outside of our attendance boundaries.

We expressed some of these concerns to the Committee of the Whole at your meeting on January 21. We received no definite answers as to why we still remain on the possible closure list,

while other schools that are clearly deficient in critical areas remain off. We again present these questions to you today. We shall continue to ask these questions until we receive valid reasons for remaining on the closure list.

We understand that you are a volunteer committee of appointed citizens with no authority to make decisions. We also understand very clearly that you have the power to damage the district's interests by your public actions. We know also that you have been given an additional charge by the School Board: to determine the effect of an increased FTE ratio at the high school level. We urge you to reassess your process. In order for closure/consolidation and future financial support to be approved by the public, it is imperative that the process be fair and impartial. We ask that you remove us from the list now, or that you subject every high school in the district to the examination which we have undergone.

NOTE: All of the quotations are from the School Closure/Consolidation Goals and Criteria.

Dear Mr. Colangelo:

I wish to thank you and members of your committee on behalf of the Jackson High School staff, students, parents and community residents for giving this community the opportunity on March 2, 1981 to present its data and views on the school closure and consolidation considerations which, as of February 4, involved Jackson High School.

The Jackson committees and many others in the audience of 800 that evening commented to me how appreciative they were that you and other members of your committee took the time to arrive early enough to be driven on a visual tour of the Jackson High attendance area by members of AJAC and its closure committee presentors. I trust that this did help those of the committee not too familiar with the Jackson community to better assimilate the factual demographic and other related data that was presented commencing at 7:30 p.m. that evening. As you know, the data related directly to the five School Board established criteria.

You will perhaps recall that I was asked by the Chairman of the Jackson School Program Subcommittee, to come to the podium regarding part of that committee's presentation dealing with the factor of FTE and the issue of "subsidation." I did try to limit myself to clarifying such data presented to you and which was based on data distributed to your and Jackson's committees by the School District dated February 23, 1981. The Jackson committee's response in essence is Page 6 which the committee hoped would put into proper perspective this entire issue.

However, I was not clear as to whether your committee members understood from my brief explanation why the Jackson committee was most concerned over the allegation of "subsidation" which it considers based on incomplete and/or misunderstood data. This is all the more significant when one understands that this single "added-on" criterion (besides the Board's five earlier ones) is what is perceived in the community as causing Jackson to be added to the list as late as February 4.

My purpose in pointing to this situation is to respond further to you and your committee in light of your Program Subcommittee explanations and questions. You will recall my comments regarding the real financial problems of the district, and the need for community appreciation of and support for your efforts and the levy--all sincerely stated. Also, my emphasis was on helping this community to understand the FTE issue which appears to them to have "zeroed in" on Jackson.

When the Subcommittee Chairman, with all good intentions, explained her committee's concerns that the excellent curriculum at Jackson could not be maintained at a ratio of 21 to 1 (a ratio

which was alluded to by School Board earlier), much more confusion and concern is resulting. The Jackson committees and I have been deluged with such questions as to:

1. Why did the consideration on February 4 deal only with Jackson and Jefferson based on existing FTE differentiation and also why were other than General Fund FTE sources excluded?

2. Why was Jefferson removed from consideration, a school very expensive to operate, as are several others known as more expensive than Jackson when total costs (all costs) are considered?

3. If your committee is considering, as the Subcommittee Chairman seems to have indicated, the effects of a possible 21 to 1 ratio, are you doing this for all schools? If not, why not? (Obviously this question among knowledgeable Jackson committee people is very, very important because it hinges on school closure and to this point is justly seen as focusing on Jackson. On those less informed in the community it conveys the notion that Jackson, relatively alone, stands vulnerable and non-operable at such a high ratio when in fact all 13 high schools would be severely impacted and at least half of them doubly so!

I apologize for the length of this communication, but I would be remiss if I were not to bring this to the attention of your committee for further clarification of this matter raised at the meeting on March 2. I especially want to be helpful even at this late date by enclosing for you and your committee the attached the data requested of all high schools by the Assistant Superintendent. Although I have seen copies of some of the other high schools' reports, I feel an obligation to share only the data on Jackson High School. I would recommend, however, that if the FTE is an over-riding factor in any recommendations that may lead to a decision to close Jackson, I would like you and your committee to consider seriously the impact of any "leveling" of ratios on all 13 high schools. Also, I respectfully suggest that recommendations include seeking alternatives such as boundary changes, student movement, open enrollment status, etc. that would make the more viable schools with greatest growth potential even more so—such alternatives should keep in mind alleviating not only the immediate budget concerns but such high priority items as key district programs projected over the next 5-10 years in schools that can hold and pull people into the city.

With this in mind, I can categorically state that Jackson could, if absolutely necessary, operate even at a 21 to 1 ratio but, like all the high schools, only with serious modifications and adjustments that undeniably would affect considerably the district's ability to maintain good to excellent high schools.

Please share this with your committee (additional copies enclosed). The Jackson Closure Committees are standing by for any additional input that you may want.

Again thank you for the work and sincerity shown by your committee in a tremendously difficult task before you.

Sincerely,

Principal of Jackson High School.

Jackson High's Patrons Rally to Save School

They don't wear T-shirts with their school's name emblazoned across the front, or shout and carry signs demanding that their school remain open.

But parents and residents living in the Jackson High School area are just as supportive of their school's program and just as angry as others that Jackson has been added to the so-called "hit list" of Portland schools being considered for possible closure.

They are still simmering over a recent meeting of the Portland School Closure and Consolidation Committee at which committee members voted 8 to 6 to put Jackson on the list.

There are 14 schools, including 4 high schools, under review for possible closure.

"We didn't fall out of their matrix (grading system for schools) and it hardly seemed fair we should have to go before the full committee," said the chairman of the 45-member Jackson Cluster Area Study of the School Closure Committee.

"They held a program (sub)committee meeting before the open meeting which was not made public," she further contends. "We'd have gladly attended if we'd known about it."

Most Jackson-area parents and residents are upset at the reasons the closure-consolidation committee's program sub-committee suggested for putting Jackson on the list--small enrollment, higher staff-to-student ratio and claims that the school receives special subsidies.

The latter issue is especially annoying to Jackson Principal Jerry Slater.

"Jackson doesn't receive any special federal or state funds and grants for special programs like the other high schools because our student population is not great enough to qualify," he said.

Slater said because of its small enrollment (about 780), Jackson in the past has received an "equal break in terms of the district's resources" with other larger schools, and one of the ways this has been accomplished is with a differential staff-to-student ratio.

That's why Jackson averages about one staff member to every 15.6 students (compared to a district average ratio of 1-17.6) and why some closure committee members consider Jackson overstaffed.

Bill Calangelo, Chairman of the Closure Study Committee, explained that Jackson would have too few teachers to offer an adequate comprehensive program if the school board decides to adopt a uniform staff-student ratio for all district schools. The board is weighing the move as part of a program to deal with the district's troubled finances.

"What we object to is the impression that Jackson is being kept afloat," said Slater. "If anything, we are being penalized, because we don't get the extra funds some of the other schools get."

Carol Hunter, chairman of the Jackson Advisory Committee, lists housing and student population growth among reasons why the closure-consolidation committee should reconsider its action.

Mrs. Hunter and others also point out that Jackson has 135 administrative transfer students from north and northeast Portland who have voluntarily transferred to the southwest Portland high school because of its variety of standard and vocational programs.

Oregon Journal, February 4, 1981

Exercise No. 4: Developing Another Hypothesis

Directions:

1. Read the three options for high school closures resulting from the staff analysis, and the news article which follows.

2. Make a prediction about which option will be chosen by the board. Are the reasons for your prediction granted in factual, or contextual information?

3. Proceed to Exercise No. 5.

STAFF ANALYSIS

Option 1: Adams, Cleveland, Washington/Monroe Criteria

	Advantages	Disadvantages
Program	• Enrollment of over 1,400 permits of all programs/ services	• Those schools with an enrollment less than 1,350 would have a potentially seriously deficient program
Fiscal/ Facility	• Closes Wa/Mo, the District's 2nd smallest high school facility and smallest high school site • Space utilization improvements: Franklin 73% - 81% Jackson 65% - 86% Jefferson 58% - 80% Lincoln 77% - 96% Madison 75% - 91% Marshall 55% - 84% Wilson 73% - 97% • Allows the possibility of relocating Tubman at Adams and realizing $3-4 million savings in Eliot remodeling	• Space utilization: Grant 89% - 103% Roosevelt 73% - 75%
Neighborhood Integrity	• Breaks down east/west demographic/geographic barriers and provides excellent facilities for magnet middle school	• All high school attendance boundaries affected • Redefines some traditional neighborhoods • Large geographical area with long distance to high school
Student Services	• Newcomer could remain at Adams • Student enrollment guarantees insure continuation of maximum levels of student services (e.g., counseling, guidance, etc.)	• Wa/Mo: requires relocation of growing ESL population • Jefferson not barrier-free • Increases number of ESL students at Jefferson • Cleveland: requires relocation of large number of special education classes and Clinton Street school
Desegregation	• Could increase minorities and A/Ts at other high schools	• Increases minority population at Jefferson to 49%
Cost Savings	• $1,993,452	

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Option 2: Adams, Jackson, Washington/Monroe

Criteria	Advantages	Disadvantages
Program	• Enrollment of over 1,400 permits provision of all programs/services	• Those schools with an enrollment less than 1,350 would have a potentially seriously deficient program
Fiscal/ Facility	• Closes Wa/Mo, District's 2nd smallest high school facility and smallest high school site	• Closes Jackson, District's largest high school site; land and buildings second in value and second newest building
	• Space utilization improvements: Jefferson 58% - 83% Lincoln 77% - 99% Marshall 55% - 79% Madison 75% - 91% Wilson 73% - 93%	• Space utilization: Cleveland 62% - 65% Franklin 73% - 75% Grant 89% - 103% Roosevelt 73% - 75%
	• Allows possibility of relocating Tubman at Adams and realizing $3-4 million savings on Eliot remodeling and provides an excellent facility for magnet middle school	
Neighborhood Integrity	• East Wa/Mo configuration appropriate with redefinition of Grant and Frankin Communities	• All high school attendance boundaries affected • Several geographical areas with long distance to high school
Student Services	• Adams to Jefferson: Space at Jefferson for special programs	• Adams to Jefferson: Jefferson not barrier-free
	• Jackson to Wilson: Few handicapped students at Jackson	• Jackson to Wilson: Would need space for Severe and Profound Class that serves other districts. Would use Wilson: Cleveland could not accomodate severe and profound population; would involve high transporation costs
	• Student enrollment guarantees insure continuation of maximum levels of student services (e.g., counselling, guidance, etc.)	• ESL: Need to split 3 1/2 classrooms to Grant, Cleveland, Franklin; also could accelerate Asian influx to Madison
Desegregation	• Could increase minorities and ATs at other high schools	• Could result in return of ATs to neighborhood schools
Cost Savings	• $1,941,352	

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FORCE FIELD ANALYSIS

Option 3: Washington/Monroe, Cleveland, Jackson

Criteria	Advantages	Disadvantages
Program	• Enrollment of over 1,400 permits provisions of all programs/services	• Those schools with an enrollment less than 1,350 would have a potentially seriously deficient program
Fiscal/ Facility	• Closes Wa/Mo, the District's 2nd smallest high school facility and smallest high school site • Closes Cleveland, District's smallest high school (main) site • Space utilization Improvements: Adams 38% - 73% Franklin 73% - 97% Jefferson 58% - 77% Madison 75% - 80% + Newcomer Marshall 55% - 90%	• Closes Jackson, District's larget high school site; land and buildings second in value and second newest • Capital outlay for Tubman at Eliot remains • Space utilizations: Grant 89% - 85% Lincoln 77% - 101% Roosevelt 73% - 74%
Neighborhood Integrity	• East Wa/Mo configuration appropriate with redefinition of Grant and Franklin communities	• Leaves south central part of city without a high school • All high school attendance boundaries affected
Student Services	• Student enrollment guarantees insure continuation of maximum levels of student services (e.g., counseling, guidance, etc.)	• Wa/Mo: require relocation of growing ESL population • Cleveland: require relocation of large number of special education classes and Clinton Street school • Jackson: require relocation of class for Severe and Profoundly Handicapped on West side
Desegregation	• Could increase minority and A/Ts at other high schools	• Could result in return of same A/T students to neighborhood schools • Increases minority population at Jefferson to 51%. Jefferson would be out of compliance with State racial balance guidelines
Cost Savings	• $1,945,099	

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Board Debate Due on School Closures

A divided Portland School Board will open its debate on school closures at 7:30 p.m. Wednesday in the Education Service Center, 501 N. Dixon Street.

After months of public discussion on alternative closure plans for next fall, the board will meet Wednesday and Thursday nights to arrive at the one plan it will recommend to the public.

That plan will be put before citizens at a public hearing May 12 in the Benson High School auditorium.

May 14, the board expects to take a final vote on closures for next year, which are aimed at saving money and improving the quality of education in the face of declining enrollment.

Beginning with Wednesday night's deliberations, all the closure meetings will be broadcast live on radio station KBPS at 1450 on the AM dial.

Over the past decade, city schools have lost more than 20,000 students, mostly because of a drop in the birthrate. Current enrollment is about 53,000 students

On the eve of the closure debate, an informal poll of school board members by the Oregonian shows broad support for elementary school closures recommended by both a citizen closure committee and Superintendent Robert West.

Under those recommendations, Foster, Normandale and Sacajawea schools are proposed to be closed next year and Sylvan School is recommended for closure in 1982.

On the controversial issue of high school closures, the poll shows board members are divided among alternative plans that would affect Jefferson, Cleveland, Jackson, Lincoln, Washington/Monroe and Adams high schools.

Based on the poll, there appears to be support for closing three--rather than only two--of the city's 13 high schools. But whether the board will make one of the two targeted west side schools--Lincoln or Jackson--part of the closure plan is an open issue.

At least three school board members--Chairman Jim Ricks, Fred Norris, and William Mills--said geographic balance between closures on the east and west sides of the city would not be a major factor in their deliberations.

Board member Frank Hawthorne said he would push for geographic balance, but declined to say whether that necessarily meant closing a west side school.

Board member Roberta McDowell said she favored only two high school closures. But if three were closed, she said she would hold out for one of the three's being on the west side.

Board member Steve Bell has taken the position that no schools should be closed, while board member Walt Poulsbo said he was "very confused" about all the closure alternatives.

On the heated issue of whether Jefferson should be moved to the Adams site in Northeast Portland, Ricks, and Norris said they were leaning toward supporting the move, while Mills and Hawthorne said there were valid arguments on both sides of the issue.

As the board's only black, Hawthorne is considered important in the decision-making on Jefferson, the city's largest black-enrolled high school with a 43 percent minority population.

"I'm looking at it with an open mind," Hawthorne said. "I'm looking at all of them (school closures) with an open mind."

The Black United Front and others in the black community have maintained that the Jefferson move, which was recommended by Superintendent West, would break promises made to blacks as part of the school district's new desegregation plan.

Under that plan, the new Harriet Tubman Middle School is to be housed at Eliot School near Memorial Coliseum. But under the proposal to move Jefferson to Adams, Tubman is recommended to be moved to Jefferson, in part because of an anticipated $3 million in renovation costs that would be necessary at Eliot.

On other high school closures, there appear to be at least three probable votes against closing Cleveland--those of Norris, Ricks and Bell.

The same lineup appears to be in the making against closing Lincoln. Other board members either declined to say which way they were leaning or said they did not know how they would vote.

Bell said he favored "no closures" for next year.

"We just haven't made the case," he said. "We haven't told the people exactly what they'd be getting by closing schools."

Ricks, the board's strongest school closure advocate, said the shutdowns were essential to operating a cost-efficient school system in the face of budgetary problems.

"The best we can do is bite the bullet and close three high schools," Ricks said. According to school officials, closure of three high schools would save about $2 million in 1981-82.

The Oregonian, May 6, 1982
School Board to debate closures prior to its May 14 final vote

Exercise No. 5: Summing Up

Remember your role and assignment.

> It's now Sunday night, and your report is due first thing in the morning.

What are your judgments and insights developed from analyzing these documents?

- What was the school closure procedure used by the district?
- What were some of its strengths? Weaknesses?
- Would you recommend it be employed in your district?